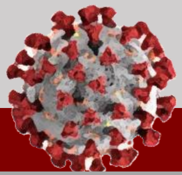


CCTO Onboarding Reference

COVID-19 Community Team Outreach

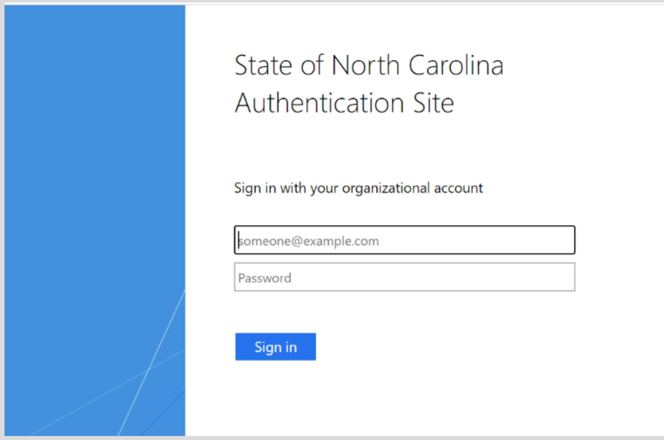
As you begin using the CCTO Tool for the first time, keep the following in mind:

Logging In

Navigate to the [CCTO Tool](#) and enter your login information.

- **If you have an email ending in dhhs.gov,** log in using your current credentials.
- **If you do not have a county or other email,** the format of your login will be YOURNCIDUSERNAME@ncid.gov.

If you experience issues logging in, try opening the Tool in an incognito window or a new browser (e.g., Chrome, Internet Explorer) where you are not already signed in. **Check with [your NCID Administrator](#) if you are unsure or continue to experience issues.**



If you experience issues, try logging in from a new internet browser before contacting your IT administrator.

Set Your Time Zone

It is important to set your time zone accurately to effectively manage your Activities in the CCTO tool.

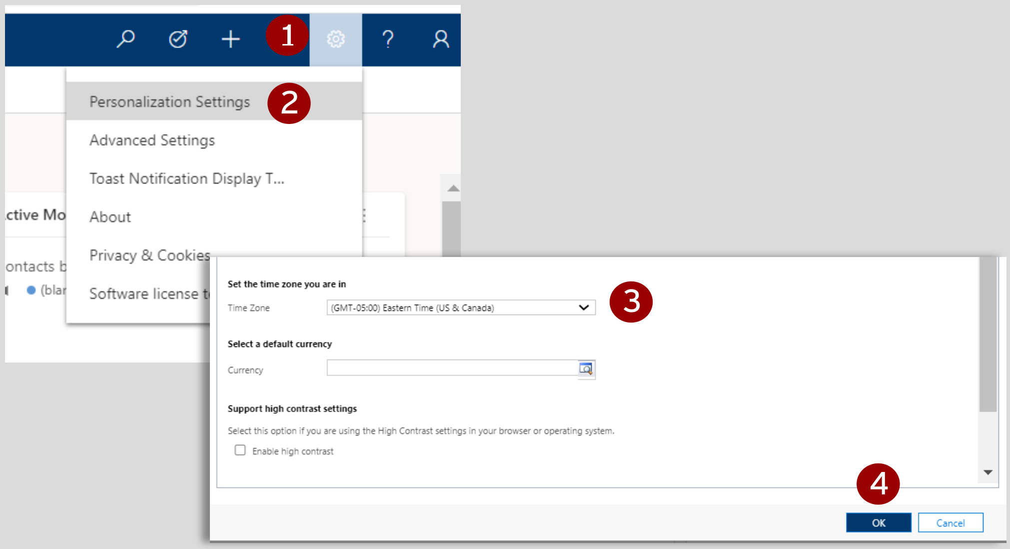
1. Click the gear icon in the top right corner.
2. Select "Personalization Settings."
3. Under "Time Zone," select (GMT - 05:00) Eastern Time.
4. Click "OK" to save.

1 **Gear Icon**

2 **Personalization**

3 **Time Zone**

4 **OK**



Viewing Your Contacts

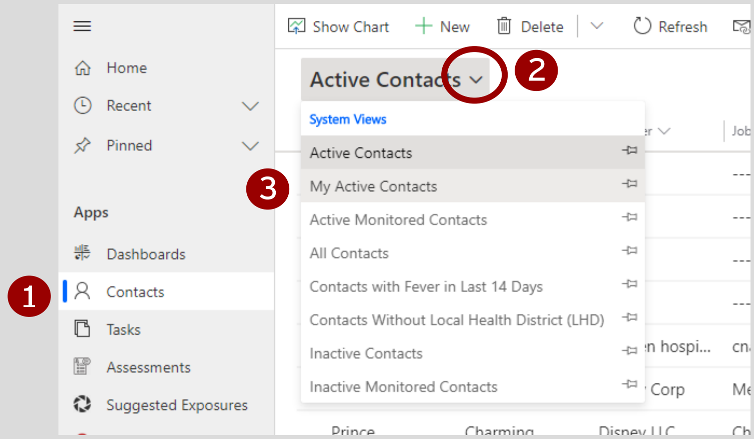
To review the contacts currently assigned to you, you can visit the Contacts Tab, drop it down, and click "My Active Contacts."

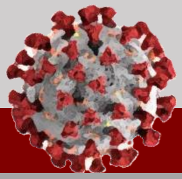
1. Visit the Contacts tab.
2. Click the arrow next to "Active Contacts."
3. To see your contacts, click "My Active Contacts" by selecting from the dropdown list of views.

1 **Contacts Tab**

2 **Active Contacts**

3 **My Active Contacts**





CCTO Onboarding Reference

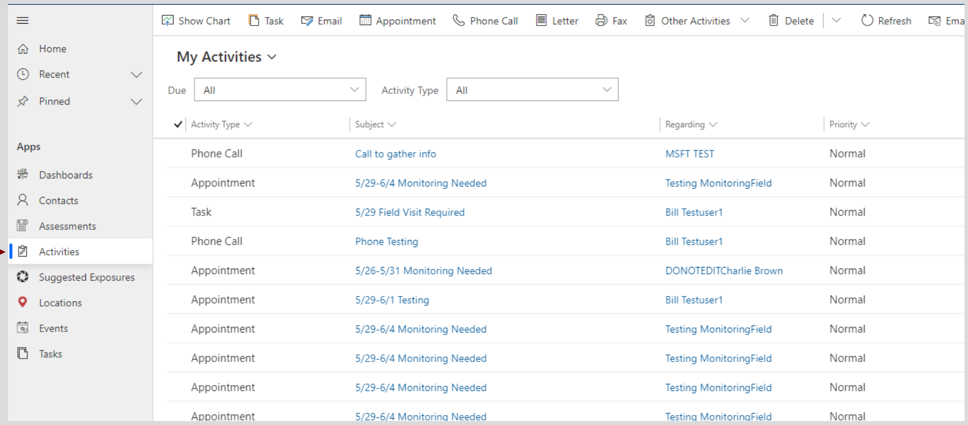
COVID-19 Community Team Outreach

After you have saved your contact, you can assign and begin monitoring from their profile.

Viewing Your Appointments & Tasks in "Activities"

To review all appointments, tasks, and phone calls that have been created and assigned to you, visit the Activities Tab. This is done by clicking the Activities tab on the left-hand side of any screen.

Activities Tab

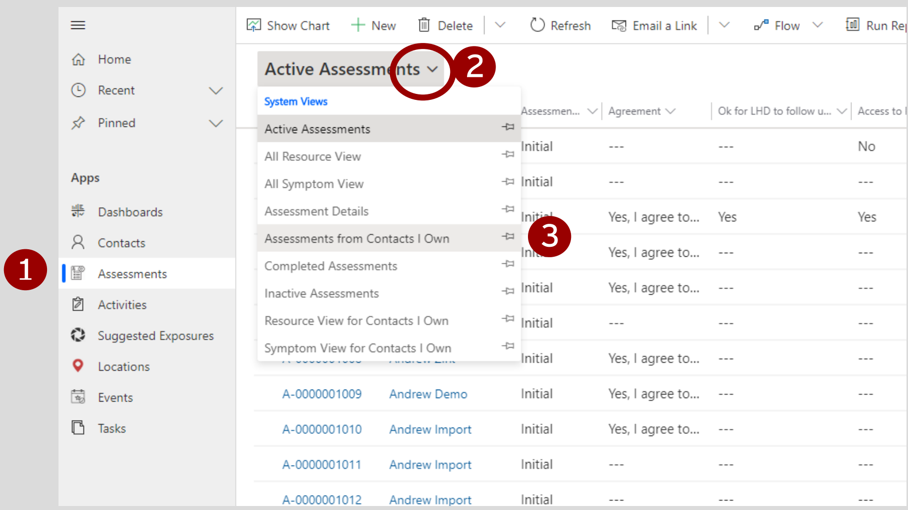


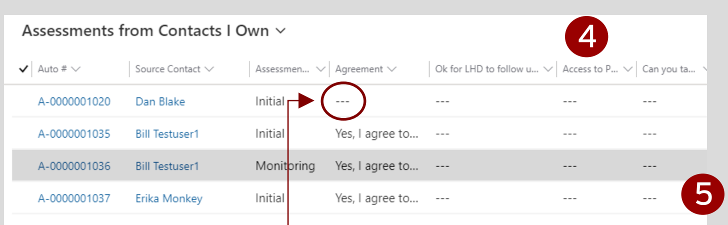
This tab will default to showing you a list of **your** open items, and you can view each in detail by clicking on it. **Please note that this list will not account for any needed appointments, tasks, or phone calls that you have not yet created.**

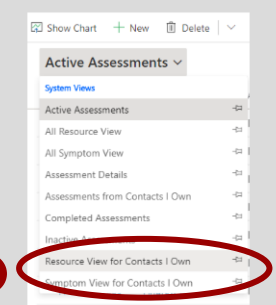
Viewing Your Contacts' Assessments in the Assessment Tab

Assessments are the record of daily monitoring for symptom changes and resource needs. The Assessments Tab pulls all assessments from individual contact profile. Each contact should have one assessment for each day of monitoring completed by phone, email, or text.

1. Click "Assessments" in the left-hand sidebar.
2. Click the arrow next to "Active Assessments."
3. Select **"Assessments from Contacts I Own"** to view only assessment responses from your contacts. You can interact with an assessment by clicking on it.
4. Note that the column headers in this tab reflect assessment responses to opt-in/opt-out, symptoms, and resource needs.
5. You may also filter this tab by **"Resource View for Contacts I Own"** or **"Symptom View for Contacts I Own"** to track needs and symptoms.







1 **Assessments Tab**

2 **Active Assessments**

3 **Asmts. from Contacts I Own**

4 **Column Headers**

5 **Resource/Symptom Views**

CURRENT ISSUE WITH ASSESSMENT DATES:

If a contact's response to the "Agreement" field is left **blank** (indicated by "---" in this column in the Assessments Tab) in either a digital assessment that did not receive a response or in a manual assessment, the "Last Assessment Date" field on their profile will not populate when the contact resumes their assessment. **To populate this date, you can choose "No. I do not want to participate" for digital assessments that weren't completed, and "Yes, I agree to participate" for any assessments you input during phone calls with a contact.** This issue will be fixed in a later software version.

"Agreement" field within a manual assessment